Lighthouse Guide 10: Using Actions

Whilst using Lighthouse there'll be lots of things you want to do - thank that donor, welcome that new member, ask another volunteer to follow up a member who's moved.

To make it easier to manage all of that and keep on track, we've created actions.

They're simple little records that can be used to track activity related to records on Lighthouse. They're available on the following record types:

- Contact
- Role
- Donations
- Pledges
- Loans
- PPERA Returns

In this guide

Creating an action

To start with, we need to navigate to an individual record of the types listed above. For the training, we'll be going through adding an action to a Contact Record belonging to Greg Foster.
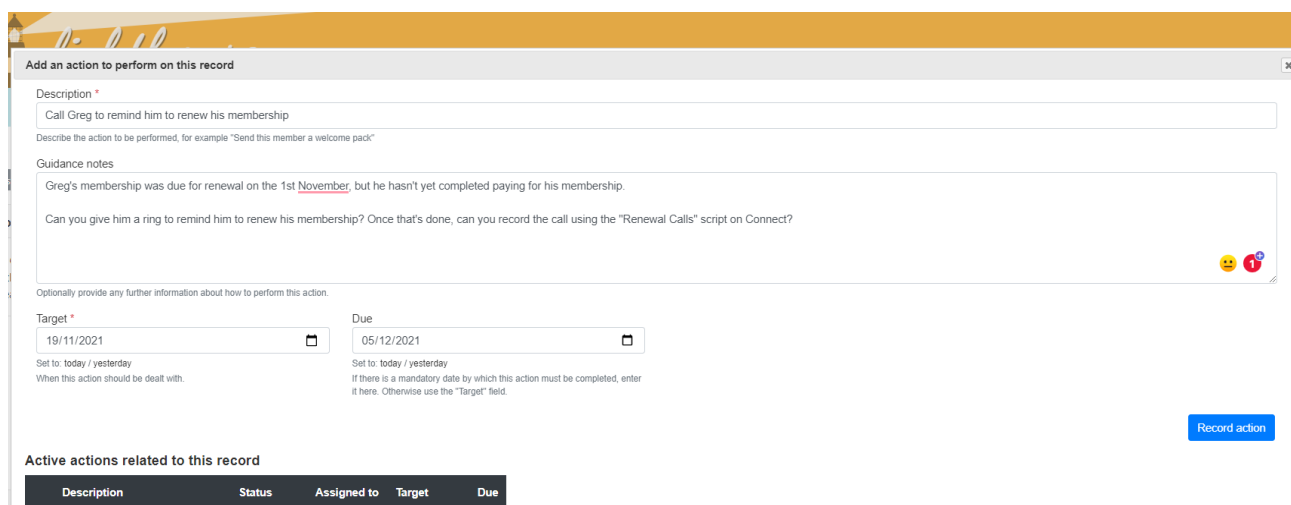
On Greg's record as part of the action buttons, you'll see a button with an alarm clock icon and the words "Add action"

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To add an action, begin by clicking this button.
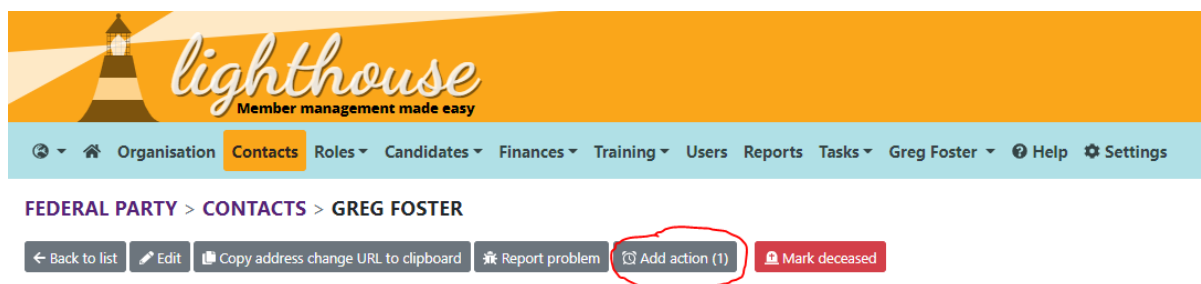
This will bring up a new window within the page that allows you to set up your action.

You'll need to give your task a name and a target date. The name is a plain text description of what you want someone to do - in this case, call a member about renewal.

The target date is the date by which you'd like them to have done.

Optionally, you can also provide them with a due date - which is the date by which a task has to be done (usually after the target date).

You can also include guidance notes - which allow you to give people context or more detailed information on how to complete the task, where to record data or things to mention.

You'll also see in the bottom left a list of any other actions related to that user - so you can make sure you're not creating a duplicate!

When you're happy with your action, press the "Record action" button in the bottom right.

If you need to cancel your action at any point, you can exit the window by tapping the X icon in the top let.

Updating actions

Once you've input your action, you'll be redirected to the Actions tab. This can be found on the navigation bar under Tasks, which also contains Problems.
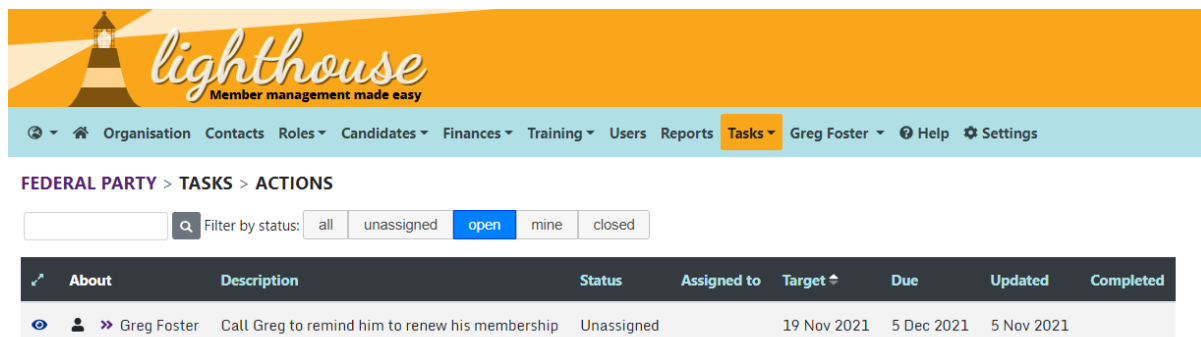
On the actions page, you have the normal selection of options. The search bar will allow you to search through actions that you have access to.

You can also use the filter options on the right to narrow down what you're looking at. The options are:

- All - shows you all actions that you have access to
- Unassigned - only shows actions that aren't currently assigned to a person
- Open - only shows actions that haven't been completed, whether they're assigned to a person or not
- Mine - only shows actions assigned to you.
- Closed - only shows completed actions.

As usual, there are link buttons on the action. The eye icon will open the action record and allow you to take further actions.

The arrow icon will open the related record and allow you to view more information about the record the task is related to.

Assigning actions

In order to start working on an action, it must first be assigned. To do this, from the Actions tab, we click on an action, which loads the relevant record page.

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On the left-hand side of the screen, you'll see a summary of the key information on the record and on the right you'll see any guidance notes associated with the task.

In the action row, you'll also see three action buttons. You have the standard "back to list" and you also have "Accept" and "Assign".

The accept button assigns the action to you - meaning you'll be able to update it in the future. The assign button allows you to assign that task to someone else.

When you click assign a window will appear allowing you to select another Lighthouse user within the organisation that the action belongs to and assign it to them.

You can also re-assign a task at any point.

Updating actions

Once you've been assigned, or assigned yourself an action, you're then able to update it further and a selection of new action buttons will appear.
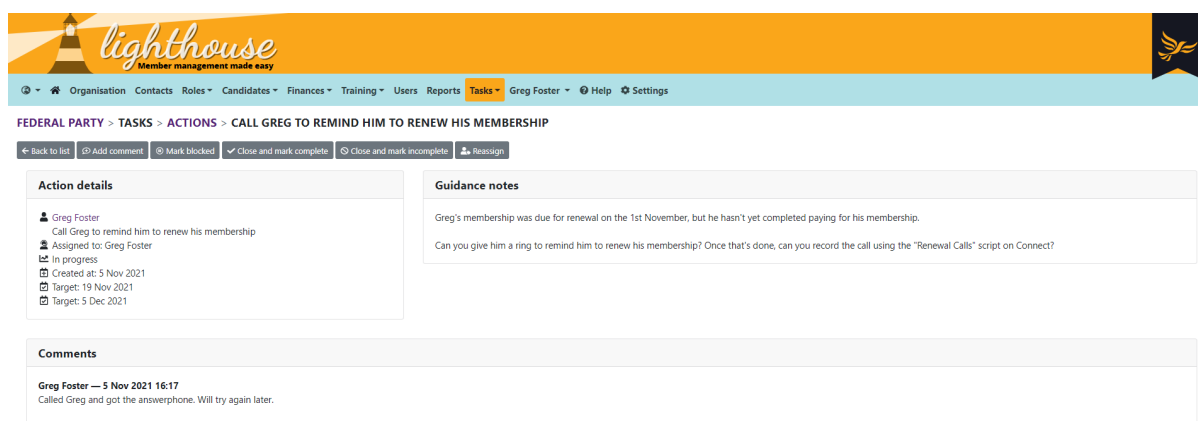

The new buttons are:

- Add Comment - this allows you to add plain text notes to the action to keep a clear history of what's been done with the action.
- Mark in progress, which updates the task status to In Progress, showing other users you're working on it.

- Mark blocked, which updates the task status to Blocked, showing other users you've run into an issue
- Close and mark complete, which updates the task status to complete, showing other users you've ticked it off your list.
- Close and mark incomplete, which updates the task status to incomplete, showing other users that you weren't able to complete the task
- Reassign, which allows you to assign the task to another person.

In the image below, you'll see that the task has been updated to in progress by our Lighthouse User - as they've attempted to call Greg, but haven't been able to get through. They've also added a comment to indicate what happened.

Each comment added to an action will be timestamped and you'll also see who made it, meaning this gives you a really good history of what happened in what order on a task.

This allows you to add lots of useful context to an action and keep others in the loop about what you're doing.

And of course, once you've completed an action, make sure you mark it as complete!

Adding actions from recent changes

You're also able to bulk-create actions from the recent changes window, which should really help you keep on top of changes in your local party.

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To do this, from the Dashboard open any of the links in the "Recent Changes" widget, by clicking on either "This Week", "Yesterday" or "Today".

You'll then arrive at the screen above.

Don't forget, you can get email alerts for changes, either daily or weekly, but selecting daily or weeky from the buttons shown on the screenshot above!

This local party has had 4 changes in the last week. A branch has been created and three members have moved out to other local parties.

In this case, the local party wants to remove these members from Nationbuilder, as they've moved away, so the local party Membership Officer, after getting their email alert is going to go in and create a new task for the Data Officer to make sure they're removed.

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Next, they're going to select the three records that they'd like to add a task to.

Important: When creating actions in bulk you can only apply one action to multiple records. So if we also wanted to create a task for the Membership Officer to follow up a new member, they'd need to do this process twice.

You then need to click the "Add Action" button - which changes colour once records are selected.

You then go through the process of creating an Action like we did in the earlier step:

If you now navigate to the Actions page you'll see three identical tasks, ready for updating.

With this tool + recent changes, your local party should be able to hugely streamline the process of managing members and supporters!

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Important: Actions is an experimental feature that's been added to Lighthouse. If people find it useful, it's something that we're really happy to keep developing.

If you don't, then we won't invest more time in it or develop it further.

So please do get in touch by emailing membership@libdems.org.uk and letting us know how you've found using Actions. Also, if there's anything that you'd like to get in addition to what's already on the system or any functionality that you think is missing, please let us know!

We want to make Lighthouse (and actions) useful to help you manage your local party and your feedback enables us to do that!